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Personal Affairs

# **Handbook on Information and Referral Service for Army Community Service Centers**

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# ***SUMMARY of CHANGE***

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Handbook on Information and Referral Service for Army Community Service Centers

This is a transitional reprint of this publication which places it in the new UPDATE format. Any previously published permanent numbered changes have been incorporated into the text.

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Personal Affairs

## Handbook on Information and Referral Service for Army Community Service Centers

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**By Order of the Secretary of the Army:**

JOHN A. WICKHAM, JR.  
*General, United States Army  
Chief of Staff*

**Official:**

DONALD J. DELANDRO  
*Brigadier General, United States Army  
The Adjutant General*

**History.** This UPDATE issue is a reprint of the original form of this publication that was published on 1 August 1985. Since that time,

no changes have been issued to amend the original.

**Summary.** This pamphlet provides guidance for the establishment and administration of an integrated information and referral system; it is to be used with AR 608-1. Included is specific guidance for selecting, supervising, and training staff and establishing and accessing the resource file.

**Applicability.** This pamphlet applies to the Active Army. It also applies to the Army National Guard (ARNG) and the U.S. Army Reserve (USAR) while on active duty.

**Proponent and exception authority.** Not applicable.

**Interim changes.** Interim changes are not official unless they are authenticated by The Adjutant General. Users will destroy interim

changes on their expiration dates unless sooner superseded or rescinded.

**Suggested Improvements.** The proponent agency of this pamphlet is the U.S. Army Community and Family Support Center. Users are invited to send comments and suggested improvements on DA Form 2028 (Recommended Changes to Publications and Blank Forms) directly to HQDA (DACF-FSA), ALEX VA 22331-0521.

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**RESERVED**

## Chapter 1 Introduction

### 1-1. Purpose of handbook

a. This handbook has been developed to assist staff of Army Community Service (ACS) centers in establishing an integrated information and referral (I&R) service delivery system that responds to the needs of commanders, service members, and families. A well-implemented information and referral service provides information regarding military and civilian community resources. As a mechanism which can successfully provide access to services, it provides a solution to the difficulties of negotiating the complex maze of community services. Negotiating services is frequently a frustrating, anxiety-provoking and unsuccessful experience. An effective information and referral service can make a significant contribution towards assisting service members and their families by connecting them with needed services and informing them of programs and services for which they are eligible.

b. For many handicapped, minority, and retired members of the Army community, there are additional barriers to the service delivery system which information and referral services can effectively address. For handicapped family members with limited access to community resources, information and referral is essential not only as a means for providing information about services available but also for providing assistance in securing needed services. The minority individual, such as the foreign-born spouse has limited access to community resources due to cultural and communication barriers and should be able to look to information and referral as a means of overcoming these barriers through communication intervention. For the aged retiree, information and referral provides a means of reaching out and informing, as well as providing access to the needed service.

c. Recognizing the critical importance of information and referral in allowing service members and families access to comprehensive coordinated services, the Army Community Service Division, U.S. Army Community and Family Support Center, revised AR 608-1, Army Community Service Program, to capture national information and referral standards.

### 1-2. Information and referral objectives

This handbook contributes to implementing ACS information and referral objectives stated below.

a. Provide commanders, service members, and families with information regarding military and civilian community resources.

b. Link service members and families with available and appropriate resources at the lowest cost and without duplication of effort.

c. Assist in long-range community planning by identifying duplications, problems, and gaps in the service delivery system and by presenting them to the installation Human Resources Council (AR 608-1, Army Community Service Program, chapter 2, section III).

## Chapter 2 Establishing and Operating an Army Community Service (ACS) Information and Referral Service

### 2-1. General

This chapter presents a description of the steps involved in starting and operating an Army Community Service (ACS) information and referral service. It is presented as a guide for those considering establishment of a service and those operating such a service. The procedures support an integrated military and civilian community-wide service delivery system. If circumstances do not permit such a system to exist, there should at least be an integrated information and referral system in operation on the installation.

### 2-2. Establishing a service

A variety of start-up activities must take place prior to initiating the service, as detailed below.

a. *Determine the Total Function of the Service.* In cooperation with other information and referral services in the community, if possible, ACS should establish initial goals and estimates as to when the service can realistically achieve these goals. Based upon these goals, decisions should be made on the scope of the services to be provided, creation of resource files, the appropriate type and number of personnel (paid, nonpaid, full, part-time), and the potential for service expansion at a later date.

b. *Planning for Staff.*

(1) Staffing patterns for the ACS information and referral service will vary according to the funds available to the service and the extent to which nonpaid staff is available and utilized. ACS may determine staffing requirements in accordance with DA Pam 570-551 (Staffing Guide for U.S. Army Garrisons) and additional documented workload.

(2) Information and referral staff responsibilities may be diversified depending on the size of the ACS service and sophistication of implementation of service components.

(3) While traditional academic criteria or job experience are not always relevant to staff selection, potential employees should be evaluated on the basis of their qualifications related to the competencies required by the job position. The following is illustrative of the type of duties which might be considered for various information and referral staff positions.

(a) *Information and Referral Coordinator.* The Information and Referral Coordinator should be capable of performing the following functions.

1. Designing and administering the information and referral service.

2. Determining program priorities.

3. Planning and conducting training.

4. Serving as a representative to community groups.

5. Developing and implementing a publicity program.

(b) *Information and Referral Specialist* (paid and nonpaid staff). Information and Referral Specialist, as the focal point of the information and referral service, should be capable of:

1. Establishing and updating the resource file.

2. Providing information.

3. Making referrals.

4. Keeping the necessary records.

5. Conducting client follow-up among those in need of assistance.

(c) On some posts, the Information and Referral Coordinator will perform both administrative as well as specialist functions.

c. *Supervising and Training Staff.*

(1) Since ACS information and referral staff may be limited, work supervision and coordination are essential. The Information and Referral Coordinator is responsible for initial training of paid and nonpaid staff and day-to-day supervision. (Appendix A contains a preservice training manual for staff orientation.)

(2) Internal priorities must be set to determine the allotment of staff time to certain tasks. It is important to use staff assignments as a part of "on-the-job" training. Close supervision is required when an assignment is given to the less skilled staff person.

(3) The coordinator must ensure adequate staff time in the office. Outside activities, such as public relations must be scheduled in accordance with available staff time. The coordinator has to be aware when work, such as recordkeeping is accumulating and must watch for instances when contacts are not being handled promptly. Such situations are signals of a breakdown in service delivery.

(4) A good staff should work as a team and this should not impose undue stress. The coordinator has to be aware of internal relationships and be able to see problems developing, as it is important to provide staff with problem-solving process. Also the coordinator should not become so removed from processing inquiries that the staff's point of view is overlooked.

(5) A useful way to create and maintain ACS staff working relationships is to establish staff sessions which involve self-evaluation. Working sessions can be held to analyze such issues as:

(a) Staff performance—Is the staff working to maximum potential?

- (b) Work assignments—Are they distributed well?
- (c) Resource file—Is the information accessible? Accurate?
- (d) Effectiveness of publicity—Is it reaching the target group?

d. *Create a Resource File.* Prior to opening the service, a resource file should be created and understood by all who will be involved in providing information and referral service in the military and civilian community. Chapter 3 of this handbook provides detailed information on the resource file.

e. *Equipment and Supplies.* Budget constraints and planned size of staff will dictate the quantity of the service's equipment and supplies. The following illustrates the basic types of articles that are usually necessary.

(1) *Major Equipment.*

(a) Desk and chair for each staff person (large double desk can be considered).

(b) Typewriters.

(c) File cabinets.

(d) Chairs for clients.

(e) Bookcases.

(f) Copymachine.

(g) Bulletin board for staff information.

(2) *Major Supplies.*

(a) Stationery, carbon paper, envelopes, plain bond and copy paper.

(b) Pens, pencils, marking equipment.

(c) Ruled writing tablets, memo pads.

(d) File cards and boxes (desk size).

(e) Manila file folders, labels for folders.

(f) Paper clips, staples, tape, thumb tacks.

(g) Desk trays, organizers, waste baskets, pencil sharpeners, staplers.

(h) Planners, calendars.

(i) Dictionaries.

f. *Telephone Service.* At least one instrument for each ACS staff person who will be handling inquiries is required and at least two incoming lines. The instruments should be capable of placing calls on "hold." If finances permit, conference-call equipment should be installed on the phones of all staff who will be handling inquiries. Also a code-a-phone (i.e., a machine to take recorded messages) or a tie-in to an answering service should be provided for recording clients' names and problems during non-office hours.

g. *Publicity.*

(1) ACS should coordinate publicity and public relation efforts with other military and civilian community information and referral services. Initial publicity should be carefully planned and spaced so that the service will not be deluged with calls at one time and under utilized at other times. It is suggested that publicity be supervised by the Information and Referral Coordination with some aspects actually being carried out by that person. Use of other information and referral staff for this function is frequently helpful and should not be overlooked.

(2) A very effective basic approach to publicity is through civilian and installation telephone directories. This requires that the service be listed in both the "white" and "yellow" pages.

(3) Agencies and organizations in the military and civilian community are generally encouraged to use the service through the following publicity methods.

(a) *Public Presentations.* Presentation describing the service can be given to various groups. A letter offering and describing such speaking services should be sent to all types of human service agencies, groups, and organizations

(b) *Flyer Distribution.* Letters should be sent to agencies and organizations requesting that they distribute the information and referral flyers to their staff and/or clientele. Flyers should be routinely included in correspondence of all kinds and in Army Community Service welcome packets.

(c) *Agency Contacts.* As new agencies or agency services are established, a letter should be sent describing the information and referral service.

(4) The final publicity tool is that of the mass media (radio,

television, and newspaper sports and articles). This requires time, effort and planning well before the service's opening date so that coverage will be assured. After the service is operating, efforts should be made to secure appearances on local radio and television stations and to arrange human interest articles in on post and off post newspapers.

h. *Recordkeeping and Reporting.* A description of recordkeeping and reporting is contained in chapter 4.

## 2-3. Operational procedures and guidelines

### a. *Information Giving and Referral.*

(1) Contact with the ACS information and referral service may be by way of a telephone call, letter or by a person walking in. This person may be an individual representing himself or herself or it could also be a person or agency contacting the service on behalf of a client, neighbor or other such person.

(2) The client may request simple or complex information. Simple information is that which requires a limited response, such as an organization's name, telephone number, and address. In such cases, it is not necessary to obtain additional information from the client to answer the question and no problem is presented. No outgoing calls are made in relationship to the inquiry and there is no follow-up. Complex information consists of providing detailed information about community service systems, agency policies, and procedures for application. No problem requiring a referral to an agency is presented. Outgoing calls may be made to validate information but no follow-up is made.

(3) For the client who presents a problem, and assessment is made to provide a referral. Assessment consists basically of the ACS information and referral service staff gaining an accurate understanding of the problems and the service(s) needed. The person making contact may identify the problem clearly. In some cases, however, interviewing skills may be required to clarify and/or partialize the true nature of the problem.

(4) Referral may be of two types: simple or complex. Simple referral is made when there is reasonable assurance that the client is competent enough to follow the referral without assistance and that the service is available at the level required and in the necessary time frame. Otherwise, the request is considered as a complex referral. An outgoing call is made on behalf of the client, and follow-up occurs.

(5) Frequently in making referrals to a new or seldom used agency, it is necessary to first confirm the policies of the agency to which the client is referred to determine the appropriate referral process. If such information is not in the resource file, ACS information and referral staff should call the agency to determine the appropriate referral process. This information can then be entered into the resource file. For some clients, it may be necessary to arrange for transportation services. If a specific appointment is being made, care must be taken to ensure that transportation is available to fit the appointment time. If the client is in the office, ACS information and referral staff may suggest that the client speak with the agency to arrange the appointment at a mutually suitable time. The information and referral staff should call the agency, explain briefly how the client's situation came to the attention of Army Community Service and introduce the client to the agency staff person.

(6) Occasionally, a request for information cannot be met or there is no agency to which the client can be referred immediately for an answer. In these situations it is strongly suggested that ACS information and referral staff attempt to track down the information for the client. When the information is obtained, it should be shared with the client by telephone or letter and added to the resource file. In the case of general information, it should also be circulated among staff for information.

(7) Mailed inquiries are generally answered by telephone if the client's telephone number is included. A letter file should be maintained in which brief disposition notes can be made on the letter itself to document proper handling of the written inquiry.

(8) Sometimes a request is for information that can best be given by another agency. With a written request, it is often more efficient and effective to send a copy of the letter to the appropriate agency.

The client should be informed of this action by letter or telephone call.

*b. Advocacy.* In some cases advocacy on behalf of the client is required to assist him or her in obtaining a needed service when unable to effectively represent self or in resolving a complaint about a service. For instance, the client may be calling the information and referral service for the second time regarding the same problem or it may be a client who comes to the attention of the ACS center by another route. Sometimes, the client is active with another agency and feels adequate treatment is not being received. The staff member of the other agency is contacted to obtain a complete picture of the situation. It is wise at this point to begin keeping complete written documentation of all communications and actions. If the problem is not resolved with the first contact, the most appropriate person at supervisory level should be contacted next. If these steps do not bring favorable results, and the agency staff do not present adequate reasons for their decision and/or actions, further contact should be made on an administrative level. In some cases, it may be necessary to advise the client of appeal processes or to make a referral to an agency offering legal assistance.

*c. Followup.*

(1) It is recognized that follow-up is both time-consuming and expensive. It is a required element in all complex referral cases to ensure quality control and to identify gaps in community services and treatment of clients. This information is critical for ACS and valuable for human service planning.

(2) It is a good idea to secure the permission of clients to conduct follow-up at the time of initial contact by inquiring "May we call you back in a few days to see how everything went?" The procedures for follow-up may involve:

(a) first calling the client to determine if needs were met;

(b) or initially contacting the agency to determine that the referral met with success;

(c) or contacting both, particularly if the client reports that his or her needs have not been met due to perceived agency failure.

(3) It should be noted that when agencies are contacted for follow-up to ascertain the client's success or failure in obtaining service or to determine the reasons for agency failure, there may be resistance on the part of the agency failure, to these efforts. It is helpful to secure agency permission at the point of initial referral, e.g., "We will call after (the appointment date) to make sure xxx got there, and so forth." In addition, when determining the reason for agency failure, it is important to stress that this activity is part of ACS, efforts to assess and evaluate its own program operation, e.g., are we making appropriate referrals, assessing problems thoroughly and accurately, and so forth, rather than to assess other agency operations.

(4) When contacting clients for follow-up, the following telephone procedure may be helpful: "Hello, I am [Information and Referral Staff Member's Name] from Army Community Service. You called us a while ago for some information. We are trying to improve our service and are calling people to see if the information we gave you at that time was helpful. Did you [THE PERSON WITH THE PROBLEM] get in touch with the agency recommended by our services? Is there anything more that we could do to help at this time?"

(5) The reasons for client failure, as determined by follow-up, may include:

(a) Client initially did not provide enough information, or the problem was incorrectly stated or identified by the worker.

(b) Client failed to keep the appointment, or decided that the service was unnecessary or unacceptable.

(c) Client needed additional support to negotiate for the service.

(6) Agency failure, as determined by follow-up, may include:

(a) Poor quality of service provided.

(b) Negative attitude toward client.

(c) Lengthy delay in service provision.

(d) Change in eligibility requirements.

(e) Inability to provide service.

(7) Followup may be considered complete:

(a) When it has been determined that the client has received the necessary services.

(b) When the client is satisfied or the problem is resolved, which may involve referring the client to another service.

(c) When it is determined that there are no services available.

## Chapter 3 The Resource File

### 3-1. General

This chapter describes the core of an ACS information and referral service—the resource file. The elements that will be discussed are: establishing the file, keeping it current, storage of its contents, and a suggested method of how to link needs and problems of the installation/community members to the service information contained in the file.

### 3-2. Resource file

*a. Establishing the Resource File.*

(1) A single resource file with uniform terminology should be established by ACS in conjunction with the other military and civilian information and referral services in the community, if possible. Each service should divide information gathering tasks and ensure that regular and systematic exchange of resource information takes place.

(2) The first step in carrying out the initial inventory for the file is to cooperatively develop an extensive list of public, private, and voluntary agencies and organizations in the military and civilian community. Some examples of resources to be surveyed are:

(a) Military

1. Housing referral.

2. Personnel and community activities.

3. Legal assistance.

4. Hospital(s), clinics, and other medical and dental services.

5. Child development services.

6. Recreational services and facilities.

7. Military police.

8. Commissary.

9. Post exchange (PX).

10. Financial counseling (Army Emergency Relief, American Red Cross).

11. Alcohol and drug services.

12. Resources of neighboring uniformed services.

(b) Quasi-military

1. Armed Services YMCA.

2. United Service Organization (USO).

3. American Red Cross.

(c) Civilian: While these apply primarily to the Continental United States (CONUS), resources are frequently available to communities outside of CONUS.

1. Local public agencies (city or county departments of social services, health departments, and so forth).

2. United Way and member agencies.

3. Crisis centers.

4. U.S. Department of Agriculture, Cooperative Extension Service.

5. Colleges.

6. Fraternal organizations (Lions, Rotary, Kiwanis, and so forth).

7. Voluntary Action Centers.

Once the initial list has been developed and organized, a schedule for collecting the following kinds of agency information should be developed.

(a) Legal name, common name, or an acronym.

(b) Address.

(c) Telephone number.

(d) Name of organization's administrator.

(e) Intake point of contact (may be name of unit or individual).

(f) Hours and days of service.

(g) Services provided.

- (h) Eligibility requirements and intake procedures.
- (i) Cost of service.
- (j) CHAMPUS (Civilian Health and Medical Program for the Uniformed Services) accepted: Yes or No.
- (k) Area served.
- (l) Branch offices.
- (m) Known barriers to accessibility and restrictions on facility use.

Telephone interviewing is suggested as the most efficient method, particularly when information appears up-to-date and the services are well defined and relatively limited. Personal interviews can be helpful, particularly if the ACS information and referral service is new and relationships need to be developed. If the number of agencies is large and staff time is limited, another alternative is to request information by mail. If this option is used, a form should be included which precisely defines the information needed. Enclosing a stamped, self-addressed envelope also facilitates response.

(3) When developing the schedule of telephone and personal interviews, time should be allowed to conduct the interviews. As a next step, letters should be written by the ACS officer about the service and to confirm the type of information being sought. For personal interviews, the letter should indicate that a follow-up telephone call will be made to establish a date for the interview.

(4) Whether the interviews are held in person or by telephone, it is important to explain the purpose of obtaining the information and how it will be used. If certain information cannot be supplied during the interview which could be provided at a later date, arrangements should be made for its receipt by the service.

#### *b. Updating the Resource File.*

(1) Updating the resource file should be continuous as changes are identified. For example, a new service offered by an agency or the information of a new organization may be reported in a newspaper or an agency newsletter. Also, in making referral arrangements for a client, the staff may find out about a new office location, telephone number, or a change in hours or eligibility requirements of an agency. Since it is unrealistic to expect agencies to notify ACS of such changes in every instance, the service must be alert to them and be responsible for adding new information to the resource file and for altering information it already contains.

(2) To augment additions/corrections to the resource file noted in paragraph 3-2 *b*(1) above, procedures should be established for periodic, systematic verification of all information contained in the file. The interval is no greater than annually. Not all resources need to be updated at once.

#### *c. Storing Resource Information.*

(1) The written records that make up the resource file must be physically stored in a manner to facilitate quick access. Resource information may be maintained in the form of a directory, card files, or an automated system.

(2) The resource file will have the following components:

(a) An alphabetical index of all public, private, and voluntary agencies and organizations with a reference to more detailed information contained in each service provider's file.

(b) An alphabetical index of service headings with cross-references.

(c) Detailed information about agencies and organizations and the services they provide (see para 3-2 *a* of this handbook).

(d) Figures 3-1, 3-2, and 3-3 contain sample formats for agency/service indexes and agency descriptions.

(3) In addition to the basic resources file and its indexes, it is helpful for ACS information and referral staff to keep certain frequently used information on hand, possibly in a set of desk files. The following are suggested as a beginning:

(a) A listing of military and civilian special education and health-related services for exceptional family members.

(b) Comprehensive referral information on military and civilian resources for educational planning, paid employment assistance and volunteer opportunities.

(c) Tables showing income limits for eligibility for certain programs, such as food stamps.

(d) Street directories and maps.

(e) Rosters of members of State and local governments.

(f) Telephone directories for municipal, county, State, and local federal offices, especially listing the phone numbers of staff in large departments such as social services.

### **3-3. The service classification system**

*a. Definition.* A service classification system is an organized way of listing the services identified through inventory.

*b. Purpose.* The service classification system facilitates rapid and accurate identification of available services in the resource file. A secondary purpose is the provision of what might be considered a "program structure" of local services to support planning functions.

*c. Description of the Service Classification System.* The service classification system described in this handbook is a modification of the Army Services Identification System. It is a suggested aid in furthering the development of a system when none exists. It consists of generic names for types of community services known as "service functions." The functions are organized into nine groupings as shown in figure 3-4 (Table of Service Functions). Definitions of functions and groupings are contained in appendix B.

### **3-4. Using the resource file**

*a. General.* As stated in paragraph 3-2 *c* of this handbook, the resource file may be in the form of a directory, card files, or automated system. The discussion that follows applies to a directory format.

*b. Determining the Problem and the Availability of the Service.*

(1) Frequently, an individual who contacts the ACS information and referral service will have some difficulty defining the precise nature of his or her problem. A series of thoughtful and tactful questions will have to be asked to help the client specify his or her problem. Once the interview has proceeded to the point where the problem can be identified, the information and referral staff person will have to decide which services are appropriate to help the *client* solve or cope with his or her problem. The staff member may refer to the Table of Services Functions for assistance in making this decision. Then, using the Service Index as a guide, determine whether a provider of that service is located in the directory.

(2) An example of the use of the Table of Service Functions and the Service Index follows. An Army spouse contacts ACS and states that he or she would like assistance in making a career decision. The information and referral staff member would pick up the Table of Service Functions and identify the Service Grouping that best describe the type of service for which they are looking. In this case, Service Grouping A. Employment and Financial Services would be selected. Then, the staff member would read the Service Functions listed until one was found that described the needed service. For this situation, it would be "career counseling." Next, "career counseling" would be looked up in the Service Index. The Service Index would provide the page in the directory where the names of the agencies that delivered the service were described.

## **Chapter 4 Recordkeeping and Reporting**

### **4-1. Purpose of recordkeeping and reporting**

*a.* The purpose of recordkeeping and reporting is to measure use and effectiveness of the service, facilitate internal administrative planning, identify gaps in services of the community, and support installation and community planning.

*b.* DA Form 5185-R (Agency Follow-up) and DA Form 5186-R (Client Inquiry and Disposition Data) in AR 608-1 are designed to respond to at least two levels of need.

(1) *Internally.* Reporting can enable the ACS information and referral service to readily monitor its activity in terms of volume, types of clients served, referrals, follow-up, or effectiveness. In essence, this can serve as a tool for ACS to use in the planning, management, and operation of its services.



(2) *Externally.* Reporting can enable ACS to generate a variety of reports on client characteristics, documentation of gaps in community services, and the volume of key problems in the community. This information is useful to planning organizations in both the military and civilian community in minimizing duplication and improving services delivery, and broadening the services network to include other needed services.

#### **4-2. Safeguarding client information**

Care must be taken to ensure that client information is safeguarded per AR 340-21, The Army Privacy Program.

## **Appendix A**

### **Training Manual for ACS Information and Referral (I&R) Staff**

#### **A-1. Purpose and scope**

This training manual in figure A-1 has been developed to assist ACS in providing adequate preservice information and referral training of uniform quality. The manual presents the structure and guidelines for an effective introductory training program for new information and referral staff. The program as outlined provides for approximately forty hours of preservice training. In the case of new staff with past I&R experience, less training would be required. After completion of the preservice training, each ACS center will maintain its own ongoing inservice training program based on the needs of the installation and the community which it serves.

#### **A-2. Structure and organization**

a. The training units are organized under roman numerals and titled, and subdivided into sections when necessary. Each section is titled, the purpose of the section is stated, and the approximate time required is estimated. In communities where resources are multiple and complex, the sections dealing with presentation of resources will of necessity require more time than in smaller communities or rural areas where local resources are less numerous. The suggested materials for display or distribution are not all inclusive but represent guidelines. ACS staff trainers are encouraged to supplement the suggestions with additional useful materials to which they might have access. Under "Presentation" in each section are guidelines concerning areas which the staff trainer should include in the presentation. Suggestions regarding participation of trainees and use of review for learning reinforcement are included. The trainer is encouraged to supplement the training with useful ideas and interpretations of his or her own.

b. Unit I deals with orientation of trainees; Unit II with the system of human services available in the community. Unit III involves human needs, interviewing skills, information giving and referral, and follow-up. Unit IV provides a framework for bringing together interviewing skills and knowledge of community resources.

c. The sequence of units is arranged to present the factual matters of community resources prior to the more sensitive areas of human needs and feelings. This sequence permits trainees to adjust to the group and the trainer before having to encounter the sometimes uncomfortable feelings which new workers in the human service field must learn to recognize, handle and integrate into their developing human service skill. The staff trainer must be sensitive to these areas of feelings experienced in the delivery of human services as well as knowledgeable regarding the local system of community services.

## **Appendix B**

### **Definitions of Terms Used in the Army Services Identification System (Modified)**

#### **B-1. Service groupings**

a. *Employment and Financial Services.* This group includes services to meet the employment and financial needs of service members and families.

b. *Food, Clothing, Housing, and Transportation Services.* Included here are services dealing with the food, clothing, housing, and transportation needs of service members and families.

c. *Education and Educational Services.* These services are aimed at the education of service members and families.

d. *Health and Environmental Services.* Here are services which protect and maintain the health of the individual and the community. The traditional hospital, clinic, and public services are included as well as environmental health/protection.

e. *Law, Regulation, and Safety Services.* These services provide protection to the community through law, regulation, and prevention

of hazards to safety. Courts, boards, regulatory agencies, law enforcement, as well as legal and tax assistance are included.

f. *Individual and Family Life Services.* This group includes services that: preserve, strengthen, and restore families; provide family substitute services; and provide individual and family supplementary services.

g. *Recreational and Cultural Services.* Included here are services providing opportunities to service members and families for enjoyment of their leisure time activities and services that provide cultural enrichment.

h. *Spiritual and Religious Services.* These services are designed to enhance the spiritual lives of service members and families. Group worship, religious/spiritual instruction, and pastoral services are included here.

i. *Social/Community Organization and Volunteer Services.* These services provide for or stimulate a process whereby people are helped to come together and find ways to improve their own lot and to improve the environment in which they live with others. Also, they promote some social good with the help and participation of individuals who have offered their services on a part-time or full-time basis without pay.

#### **B-2. Service functions**

a. *Adoption.* Provides children with a permanent home under new legal parentage.

b. *Adult Education.* Provides opportunities for adults to acquire knowledge and skills either missed in their formal education or supplementary to those acquired formally. Adult education is geared towards the self-development of adults who are voluntarily seeking development of their skills and knowledge. Admission to adult education is open. Adult education may include instruction in a wide variety of subjects including arts and crafts, social science, history, culture, and foreign language.

c. *Alcohol/Drug Services.* Services which treat or prevent abuse of and dependency on alcohol or drugs.

d. *Ambulance.* Dispatches emergency vehicles and crews which give first aid or other medical treatment to the acutely ill or injured. The ambulance then takes the injured or ill individual to a health care center.

e. *Animal Control and Protection.* Services which regulate animals. Dog catchers, pet licensing agencies, animal humanity inspectors, entomology services are included.

f. *Arts and Crafts.* Operates a facility for the pursuit of a specified art or craft activity. Operates a craft program in the skills of the specified craft by conducting training in the craft and participating in arts and crafts promotional events. Promotes the acquisition of craft skills and provides tools, equipment, and materials to pursue them.

g. *Burial and Graves.* Provides burial details and grave sites for eligible service members. Provides administrative coordination of casualties reported.

h. *Career Counseling.* Counseling provided to an individual to assist him or her in making a career decision.

i. *CHAMPUS (Civilian Health and Medical Program for the Uniformed Services).* Payment assistance for the health services that are received from civilian sources by service members and families.

j. *Chaplains.* Services of clergy persons who provide for the spiritual and pastoral needs of service members and families.

k. *Chaplain Support Activities.* Training supported by the chaplaincy to promote individual/community moral, ethical, spiritual and social development apart from but in support of the objectives of formal religious activities. Human values and dignity, spiritual strength, morality, freedom, responsibility, accountable dissent, family life, and personal goal setting are examples of topics which may be covered.

l. *Child Abuse and Neglect.* Services which promote the growth, development, and general welfare of children through prevention, reporting, identification and treatment of child abuse or child neglect.

m. *Child Development Services.* Child Development Centers and

Family Child Care Homes. Full day, part day, or hourly services for children from 4 weeks to 12 years of age.

*n. Childbirth—Prenatal and postnatal Care.* Care and education for mothers-to-be and new parents to include parent training, childbirth training, and medical care for fetuses and neonates.

*o. Citizenship.* Services which help citizens of foreign countries qualify for U.S. citizenship.

*p. College.* Higher education aimed at awarding academic degrees.

*q. Commissary.* The commissary on post. This is basically a grocery store.

*r. Community Center/Community Activity Center.* A facility designed for use by people from a certain community. Community centers may include meeting rooms as well as some recreational equipment. Some community centers sponsor programs for children, teens, adults, and senior citizens. Such programs may be recreational, service programs, and fundraising. Additionally, a community activity center is a facility designed or adapted to support major morale support activities. It may include craft rooms, dinner theater, music practice rooms, library, and/or exercise rooms.

*s. Community Orientation.* Activities which disperse information intended to orient newcomers to the post and/or the local community.

*t. Community Relations.* Activities which work to develop cooperation and mutual respect between the post and the local civilian community.

*u. Conservation of Nature.* Services aimed at conserving natural animal and plant populations and the aesthetic natural, and agricultural value of land, water, and air.

*v. Consumer Protection.* Services protecting service members and families from any type of fraudulent, deceitful, unfair transaction, or trade practice.

*w. Correspondence Education.* Educational courses are divided into lessons which are sequentially sent to the students who reside at locations remote from the school. Evaluation (grading) of the student's progress is accomplished through the use of testing centers or through self-administered tests.

*x. Counseling.* Relates to an individual or counseling group through the use of interview, conversation, and assessment techniques to assist the individual or group in meeting, resolving, and overcoming obstacles to personal development and/or the harmful results of traumatic experiences.

*y. Crime Prevention Programs.* Services which seek to decrease the incidence of crimes through preventive measures.

*z. Crisis Services.* Provides immediate assistance to individuals experiencing a personal crisis. Such a crisis may be suicidal thoughts, acute anxiety, depression, and feelings of helplessness. Crisis services usually involve a hot line, where those experiencing a crisis can call and talk to someone who will help them get a perspective on their troubles and refer them to sources of help.

*aa. Dental Care.* Treatment activity providing diagnostic, preventive, and therapeutic dental services.

*ab. Dependent Identification Cards.* The service which determines that individuals meet the legal and administrative requirements of being the dependent of a service member and issues an identification card for the dependent.

*ac. Education Center.* A service agency on post which provides a centralized location where service members and family (on a space available basis) receive a wide range of educational services. The Education Center arranges and coordinates classes provided on post by non-military schools and colleges.

*ad. Educational Counseling and Testing.* A counselor with a wide knowledge of educational concerns provides individualized information, advice, and other assistance. This counseling is designed to assist individuals in making optimal educational decisions and to assist them with problems they may have which are related to education. Educational testing involves administration of standardized tests or interest inventories. The tests and inventories may be designed to aid in making a decision to qualify the individual for

financial assistance, admission to a school, or some kind of academic creditation.

*ae. Emergency Financial Assistance.* Disburses loans, grants money, or provides assistance to eligible individuals who are experiencing an acute shortfall of money to meet the subsistence needs of themselves and/or their families.

*af. Emergency Room.* A clinic that provides emergency and walk-in medical care.

*ag. Employment Assistance.* Assistance or referral to help people in finding full-time or part-time employment in accordance with their skills, talents, capabilities, and experience.

*ah. Environmental Health.* Provides health and environmental services, assistance, and advice to all Army elements within the medical department activity (MEDDAC) area of responsibility to improve community health and prevent disease and injury; sponsors installation public health education and promotional programs. Operates the food service sanitation inspection and educational programs. Provides entomological surveillance and pest management programs.

*ai. Equal Opportunity.* Services which seek to ensure that all individuals are treated as equals in regard to opportunities for self-advancement and social relationships. These services are focused on eliminating discrimination against individuals and groups which is based on race, color, creed, national origin, ethnic background, or sex.

*aj. Equipment Rental: Recreation.* Rental of equipment designed for recreation use, such as camping equipment and sporting goods.

*ak. Financial/Budget Counseling.* Information, advice, or training to help service members better organize expenditures for household, family, or individual needs.

*al. Financial Assistance for Education.* Grants, credit, scholarships, loans or other aid provided to learners to assist them in paying the costs of education.

*am. Financial Assistance with Health Care Costs.* Subsidies or insurance provided to help pay the costs of health care.

*an. Fire Department.* A service which puts out destructive fires and seeks to eliminate fire hazards through inspections and public education/awareness.

*ao. Food Locker/Food Stamps.* A food locker loans food staples to individuals who have an acute need for food for themselves or their families when they cannot afford to buy food. Food stamps is a program of the Department of Agriculture which issues food coupons (food stamps) to qualifying low income individuals. The food stamps have a dollar value and are used for food purchases at food stores. The food stamps are sold to individuals at a cost which is less than their dollar value for food purchases.

*ap. Foster Home Care.* Provides a substitute family life experience in an agency-supervised home to children who need care for a temporary or extended period during which the normal family environment is either non-existent or greatly hampered because of some social, emotional or physical reason.

*aq. High School Completion.* Training designed to give an individual skills equivalent to the high school graduate and testing designed to certify that the individual has such skills.

*ar. Hobby or Recreation Clubs.* Clubs/organizations formed by service members and for service members to facilitate their pursuing and enjoying a hobby or special interest.

*as. Homemaker.* Provides substitute homemaking assistance to households where the regular homemaker is absent or incapacitated. Assistance may include menu planning, budgeting, shopping, child care, meal preparation, and general household management.

*at. Home Visitor.* Services which send friendly visitors into the homes of shut-ins to provide social stimulation.

*au. Hospital.* Provides a wide range of services including medical, surgical, or psychiatric treatment, nursing care, food and clothing, residential and outpatient treatment.

*av. Housing Referral.* Refers service members and families to their optimal housing choice in the civilian community.

*aw. Human Relations.* Services which are aimed at reduction of tensions among potentially antagonistic and prejudicial groups

within the community and promote understanding and harmony among such groups.

*ax. Indoor Sports Facilities.* Gymnasium or other facilities designed and intended for the purpose of indoor athletic sports.

*ay. Information on Education.* Provides information on education to include the fees, requirements for admission, accreditation, course schedules of schools, colleges, and training centers.

*az. Inspector General.* An officer detailed as an inspector general who examines and reports on every phase of activity that affects the discipline, efficiency, and economy of a command, installation, or activity.

*ba. Installation Clubs—Enlisted, NCO, and Officer.* Private clubs for enlisted personnel, noncommissioned officers, and commissioned officers operated by Installation Club Management.

*bb. Juvenile Delinquency Control.* Services aimed directly at the enforcement of juvenile laws and codes.

*bc. Juvenile Delinquency Prevention.* Services aimed at preventing juvenile delinquency.

*bd. Legal Assistance.* A program sponsored jointly by the military service and the American Bar Association under which legal advice and assistance is made available to service members and their families to help them in solving their personal legal (non-criminal) problems.

*be. Lending Closet.* Loans necessary household items to service members and their families. Usually, this service is designed for people who are moving or who have just moved and whose household goods have yet to arrive.

*bf. Library.* A repository of books, periodicals, publications, audiovisual material, and manuscripts which loans these items to eligible individuals. Library services, such as certain kinds of library research, bookmobile, assistance in finding needed materials and inter-library loans are also provided.

*bg. Licenses.* Any agency which issues a license to members of the public as required by law or regulation.

*bh. Medical Equipment Borrowing/Rental.* Loans or rents medical equipment to outpatients or those temporarily disabled. Examples of such equipment are crutches, wheel chairs, and hospital beds.

*bi. Mental Health and Mental Hygiene.* Psychotherapy and other therapy meant as a treatment for psychological or behavioral disorders. Also, consultation provided to help solve morale and/or discipline problems in units is included.

*bj. Military Police.* The organization charged with the control of the conduct of service members through the promotion of compliance with, and the enforcement of military laws, orders and regulations; traffic control; crime prevention, investigation and reporting; apprehension of military absentees and escaped prisoners; providing security for military supplies, equipment, and material. Their jurisdiction is limited to persons subject to the Uniform Code of Military Justice and to such other persons as may be required to obey military law when so proclaimed by the President or other competent civilian authority.

*bk. Movie Theater.* A facility which shows entertaining motion pictures.

*bl. Museums.* A facility which exhibits items of historic, scientific, cultural, or artistic interest.

*bm. Music.* Any provision of musical entertainment. Also, programs which encourage acquisition of musical skills or music appreciation.

*bn. Neighborhood Organizations.* Organizations of neighborhood residents who work to improve the neighborhood.

*bo. Nursing: Community Health.* Provides a family centered community nursing service for the military population. Through home nursing, case finding, and follow-up care, assists in developing positive health attitudes, preventing disease and injury and regaining maximum health. Sponsors health education programs, acts as consultant in schools and occupational health centers; coordinates plans for patient care; and maintains liaison with local health and welfare agencies and other health professionals.

*bp. Organizational Effectiveness and Development.* Uses behavioral and management science techniques to improve the functioning of organizations.

*bq. Organized Sports and Athletics.* An activity which organizes or coordinates teams, leagues, competitions, or tournaments for a specified sport.

*br. Outdoor Sports Facilities.* Equipment or facilities emplaced out of doors for a sport or other athletic endeavor. Examples are football, soccer, or baseball fields; tennis courts; and tracks.

*bs. Pastoral Counseling.* Acting as a religious pastor, the chaplain meets privately with individuals or groups for the purpose of helping them in religious concerns or to help them with their problems.

*bt. Pay Services.* Any/all services provided by the Army personnel system.

*bu. Pharmacy.* The office which disburses prescription and non-prescription medicines and medical items.

*bv. Physical Examinations.* Medical examinations designed to ascertain the health of an individual and to describe health problems if there are any.

*bw. Police: Civilian.* Law enforcement agencies of civilian government.

*bx. Pollution Control.* Services which monitor and regulate industrial, military, automotive, agricultural, or household discharges of waste products or accidental spillage of hazardous substances.

*by. Post Exchange (PX).* Retail outlets wherein merchandise of necessity and convenience are sold or rented in the context of the Army and Air Force Exchange Service.

*bz. Private Clubs (other than installation clubs).* Private activities are clubs/organizations of personnel that have acquired a facility (such as a building or gun range) for their own use. Private clubs collect dues and/or membership fees and the use of their facility is normally restricted to dues paying members.

*ca. Quartermaster Laundry and Clothing Sales Stores.* Laundry service for military uniforms and sales outlet for military clothing provided by the quartermaster.

*cb. Quarters: Family and Troop.* Temporary or permanent housing for troops and/or their families provided by the government. The housing may be owned, leased, or rented by the government. Related housing services, such as housing maintenance are included here.

*cc. Rape Victim Assistance.* Services that provide assistance and support to rape victims and/or help the rape victim receive fair treatment in legal proceedings.

*cd. Recreational Areas.* Outdoor areas equipped for recreational outings. Picnic grounds, parks, lakeside beaches, public lakes, and designated public forests and lands are examples of recreational areas.

*ce. Regional Recreational Areas.* Resort areas owned by the Army and intended primarily for use by service members. Others can use the resorts on a space available basis.

*cf. Registration.* Any service which registers property for the purpose of ensuring that registered items are in compliance with a regulation or law.

*cg. Religious Groups and Clubs.* An organization or group formed by service members and families for the purpose of pursuing a religious activity. An example of such a group is a Bible study group.

*ch. Religious and Spiritual Instruction.* Organized instruction or study of the tenets of religious faith, theology, or other spiritual concerns.

*ci. Retirement Services.* Specialized information sources for retirees concerning services available to them as benefits. Included is the military retiree's newsletter.

*cj. Safety.* A service which seeks to eliminate injury or illness of service members and families by eliminating hazardous conditions; preparing procedures, plans, and regulations which minimize hazards in public and work areas; inspections of potential safety hazards; investigation and follow-up of accidents; and training in safe procedures for workers and the public.

*ck. Schools: Kindergarten through Grade 12.* Formal academic

education in yearly graded increments designed for persons usually 5 years to 17 years old.

*cl. Self-Help Program.* A program which provides free materials to those who desire to improve their on post quarters. This program also lends the equipment required to do the job.

*cm. Services: Religious Worship.* Rites, ceremonies, services, or meetings prescribed by religious faith.

*cn. Sick Call.* Daily assembly when all sick and injured, other than those in the hospital, report to a medical officer for examination and/or treatment.

*co. Social/Civic Clubs and Organizations.* Organizations providing opportunities for social contact and/or for working to improve the community. Examples of social civic clubs are wives clubs and Sierra Club chapter.

*cp. Social Work: Health Related.* Provides professional social work services, as needed, to patients and families. Provides social studies, individual or group counseling of patients to minimize social impact of illness, disability of hospitalization upon the patient or his or her family and referral service to appropriate military or civilian resources to meet the needs of individual patients.

*cq. Tax Assistance.* Information and assistance given to help service members and families pay taxes and avoid overpaying taxes.

*cr. Theater and Stage.* A facility and/or program which provides for stage entertainment, such as plays and musicals. Such programs usually provide training in stage arts and/or opportunities for participation in theatrical productions.

*cs. Thrift shop.* A voluntary organization that sells used items on consignment for military families.

*ct. Ticket Outlet/Entertainment Information.* An office where people can go to buy tickets for and get information on entertainment events scheduled on post or in the nearby community.

*cu. Transportation.* Sources of geographical conveyance.

*cv. Travel and Recreational Services.* Provides information on and helps make arrangements for recreation/vacation travel, commercial tours, or tours of local area.

*cw. Unit Level Entertainment.* Any entertainment, sporting, or athletic program carried on under the sponsorship of a unit.

*cx. Volunteerism.* Programs designed to recruit, train, consult, mobilize and coordinate volunteer resources to promote the public good.

*cy. Voting Information.* Information and assistance given to service members and families to ensure adequate opportunity to vote in governmental elections.

*cz. Youth Activities.* A facility and program which provides or sponsors recreational and developmental activities for children of service members.

Name of Agency/Organization	Page
Agriculture, US Department of Cooperative Extension Service	.....
Al-Anon and Alateen	.....
Alcoholics Anonymous	.....
American Red Cross	.....
Animal Control, Department of	.....
Armed Services YMCA	.....
Army Community Service	.....
Army Emergency Relief	.....

**Figure 3-1. Agency index**

Service	Page
Adoption	.....
Adult Education	.....
Alcohol/Drug Services	.....
Ambulance	.....
Animal Control and Protection	
Arts and Crafts	.....
Automobile Licenses See Licenses	

**Figure 3-2. Service Index**

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Consumer Protection

BETTER BUSINESS BUREAU OF METROPOLITAN WASHINGTON  
1012 14th Street, NW, Washington, DC 20005  
TELEPHONE: 393-8000

ADMINISTRATOR: Douglas W. Tindal

INTAKE POINT OF CONTACT: Marsha Goldberger

HOURS/DAYS OF SERVICE: Monday-Friday, 9-5

SERVICES PROVIDED:\* Provides consumers with reports on businesses as to the length of time a company has been in business and their performance ability. Maintains a complaint record on companies, mediates complaints for consumers, offers arbitration to settle disputes not helped through mediation, gives reports on charitable organizations; can provide information on out of state firms.

ELIGIBILITY REQUIREMENTS/INTAKE PROCEDURES: None specified

COST OF SERVICE: None

CHAMPUS ACCEPTED: No

AREA SERVED: Washington, DC and surrounding suburbs

BRANCH OFFICES: 105 East Annandale Road, Falls Church, VA 22046  
TELEPHONE 533-1900  
6917 Arlington Road, Bethesda, MD 20814

TELEPHONE: 656-7000

BARRIERS TO ACCESSIBILITY/RESTRICTIONS ON FACILITY USE: None

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\*Definition of services provided was extracted from the 1981 edition of the Montgomery County Information and Referral Resource Data Base.

**Figure 3-3. Agency description**

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**Service Grouping A**  
**Employment and Financial Services**

Career Counseling  
Emergency Financial Assistance  
Employment Assistance  
Financial budget Counseling  
Pay Services

**Service Grouping B**  
**Food, Clothing, Housing, and**  
**Transportation Services**

Commissary  
Food Locker/Food Stamps  
Housing Referral  
Lending Closet  
Post Exchange (PX)  
Quartermaster Laundry and Clothing Sales Stores  
Quarters: Family and Troop  
Self-Help Program  
Thrift Shop  
Transportation

**Service Grouping C**  
**Education and Educational Services**  
Adult Education

College  
Correspondence Education  
Education Center  
Educational Counseling and Testing  
Financial Assistance for Education  
High School Completion  
Information on Education  
Library  
Schools: Kindergarten through Grade 12

**Service Grouping D**  
**Health and Environmental Services**

Alcohol/Drug Services  
Ambulance  
CHAMPUS  
Childbirth: Prenatal and Postnatal Care  
Conservation of Nature  
Crisis Services  
Dental Care  
Emergency Room  
Environmental Health  
Financial Assistance with Health Care Costs  
Hospital  
Medical Equipment Borrowing/Rental  
Mental Health and Mental Hygiene  
Nursing: Community Health  
Pharmacy  
Physical Examinations  
Pollution Control  
Rape Victim Assistance  
Sick Call

Social Work: Health Related

**Service Grouping E**  
**Law, Regulation, and Safety Services**

Animal Control and Protection  
Child Abuse and Neglect  
Citizenship  
Consumer Protection  
Crime Prevention Programs  
Dependent Identification Cards  
Equal Opportunity  
Fire Department  
Inspector General  
Juvenile Delinquency Control  
Juvenile Delinquency Prevention  
Legal Assistance  
Licenses  
Military Police  
Police: Civilian  
Rape Victim Assistance  
Registration  
Safety  
Tax Assistance  
Voting Information

**Service Grouping F**  
**Individual and Family Life Services**

Adoption  
Burial and Graves  
Child Development Services  
Community Orientation  
Counseling  
Foster Home Care  
Homemaker  
Home Visitor  
Retirement Services

**Service Grouping G**  
**Recreational and Cultural Services**

Arts and Crafts  
Community Center/Community Activity Center  
Equipment Rental: Recreation  
Hobby or Recreation Clubs  
Indoor Sports Facilities  
Installation Clubs  
Library  
Movie Theater  
Museums  
Music  
Organized Sports and Athletics  
Outdoor Sports Facilities  
Private Clubs (other than installation clubs)  
Recreation Areas  
Regional Recreation Centers  
Social/Civic Clubs and Organizations  
Theater and Stage  
Ticket Outlet/Entertainment Information  
Travel and Tours Recreational Services  
Unit Level Entertainment  
Youth Activities

**Service Grouping H**



## **Spiritual and Religious Services**

Chaplains

Chaplain Support Activities

Pastoral Counseling

Religious Groups and Clubs

Religious and Spiritual Instruction

Services: Religious Worship

## **Service Grouping I**

### **Social/Community Organization and Volunteer Services**

Community Relations

Human Relations

Neighborhood Organizations

Organizational Effectiveness and Development

Volunteerism

**Figure 3-4. Table of service functions**

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## Unit I. Orientation to ACS Information and Referral Service

*Purpose:* To clarify the purpose of the ACS information and referral service and the historical and social context from which it evolved, and to orient new employees to the service.

*Time:* 3 hours.

*Materials:* Diagram of ACS center, personnel information, and brochures. Flip charts or blackboard for visual aid. Brochures and pamphlets from other I&R services, if available. Film, "Tell Me Where to Turn," which can be obtained from Public Affairs Committee (ATTN: Director of Education), 381 Park Avenue, South, New York, NY 10016.

*Presentation:* Made by staff trainer. The presentation should follow viewing the film "Tell Me Where to Turn," and include discussion of the purpose of I&R services generally. Following discussion, presentation should focus on the ACS information and referral service, expressed need for service in the community, and how ACS came into being. Attention should be directed to ACS program activities, structure, policies, and personnel information.

*Participation:* Questions and discussion.

## Unit II: Military and Civilian Community Service System

### Section A: Introduction to Military and Civilian Community Service Resources

*Purpose:* To begin process of familiarization with military and civilian community service resources and the I&R resource file.

*Time:* 2 hours.

*Materials:* Resource file, directories of community services, and flip charts or other visual aids as available.

*Presentation:* May be made by appropriate guest speaker or staff trainer. The concept of military and civilian community services as an integrated system of services and service delivery should be introduced. Imperfections in the system should be discussed along with ACS's role within the system and its function to identify service gaps for planning input. The resource file can be explained with a brief introduction to agencies and organizations in the community. Trainees should know that more detailed information will be included in subsequent training sessions.

*Participation:* Questions and discussion.

*Review:* A review of each section of Unit II is unnecessary, since there will be a review section at the end of Unit II.

### Section B: Large Civilian Public Agencies: Department of Social Services; Department of Health

*Purpose:* To continue process of familiarization with community service resources and the I&R resource file.

*Time:* 3½ hours.

*Materials:* Outline of presentation (as shown below), I&R resource

file, any other appropriate resource material, brochures and pamphlets from local department of social services and department of health.

*Presentation:* May use guest speaker from the local department of social services and department of health and/or staff trainer. The following services outline should be used with an explanation/demonstration of how the information is reflected in the resource file.

#### *a. Department of Social Services.*

(1) Specific services offered and eligibility factors.

(a) Medical assistance.

(b) Foster care.

(c) Homemaker services.

(d) Day care.

(e) Adoption.

(f) Food stamps (include relationship to U.S. Department of Agriculture).

(g) Protective services (include definitions of neglect and abuse).

(h) Emergency services.

(2) Intake procedures.

#### *b. Department of Health.*

(1) Specific services and eligibility factors.

(a) Public health.

(b) Medical care.

(c) Alcoholism and drug abuse.

(d) Mental health.

(e) Communicable disease.

(f) Community sanitation.

(2) Intake procedures.

*Participation:* Questions and answers.

### Section C. Other Agencies and Organizations

*Comment:* This section may be expanded into two sessions in military and civilian communities where a large number of agencies and organizations exist.

*Purpose:* To continue process of familiarization with community resources and the I&R resource file.

*Time:* 3 to 6 hours.

*Materials:* Outline of presentation (as shown below), I&R resource file, and other appropriate resource material including pamphlets and brochures.

*Presentation:* Review the I&R resource file format including method of indexing, updating and adding supplemental reference material. Utilizing the resource file, locate military and civilian agencies and organizations. Discuss various public, private, and voluntary agencies and organizations, including their purpose, intake procedures, and services, such as—

#### *a. Financial Assistance.*

(1) Army Emergency Relief.

(2) American Red Cross.

#### *b. Counseling.*

(1) Family and individual.

(2) Pastoral.

(3) Private practice.

(4) Budget.

(5) Retirement.

(6) Other.

#### *c. Mental Health Services.*

(1) Outpatient.

- (2) Inpatient.
- (3) Crisis intervention.

*d. Medical Services.*

- (1) Outpatient.
- (2) Inpatient.
- (3) Special clinics.
- (4) Health appliances and equipment.
- (5) Other.

*e. Transportation.*

- (1) Medical.
- (2) Other.

*f. Housing.*

- (1) Housing referral.
- (2) Private housing and federally assisted private housing.
- (3) Room and board.
- (4) Other.

*g. Recreation and Education.*

- (1) Centers.
- (2) Other.

*h. Nutrition.*

- (1) Emergency food.
- (2) Other.

*i. Support Services.*

- (1) Legal assistance.
- (2) Day care.
- (3) Homemaker assistance.
- (4) Other.

*j. Employment Services.*

- (1) General.
- (2) Specialized.

*k. Volunteer Opportunities.*

- (1) General.
- (2) Specialized.

*Participation:* Questions and discussion.

#### Section D. Review

*Purpose:* To reinforce, clarify and stress major aspects concerning the trainees' knowledge of military and civilian community service system and I&R resource file.

*Time:* 3½ hours.

*Materials:* All materials used in prior Unit II sessions.

*Presentation and Participation:* Staff trainer should conduct a review of Unit II. Major military and civilian agency and organizational services should be emphasized. Differences between public, private, and voluntary agencies and organizations should be reviewed. Trainees should be encouraged to participate with questions and answers. The review session involves a more formal give-and-take exchange between trainer and trainees than was prevalent in prior sessions. This "breaking of the ice" and establishment of rapport between trainer and the training class is important as preparation for subsequent training in sensitive areas, in which such a relationship is essential.

### Unit III. Human Needs, Interviewing Skills, Information Giving and Referral, and Follow-up

Section A: Background for Interviewing: Common Needs and Feelings.

*Purpose:* To introduce new I&R staff to interviewing concepts and the importance of understanding people.

*Time:* 3½ hours.

*Materials:* Outline of presentation (as shown below).

*Presentation and Participation:* Trainer to present, lead discussion and summarize the training material shown below. The trainer may supplement with examples and other material as desired. Each subsection may be role played with the trainee posing as the client and the trainer as the interviewer.

*a. Interviewing: Definition and Purpose.* Interviewing is not an unusual activity. Most individuals today have been interviewed a number of times, for school, for jobs, in transacting business or in dealing with agencies in the private and public sectors. Interviews usually involve an interviewer and a person or persons being interviewed. The interview itself may be defined as a type of conversation for the purpose of imparting and receiving information. In an I&R service the purpose of interviewing is to obtain sufficient information regarding a client's problem to effect linkage with appropriate community service.

*b. Interviewing Problems.* The person contacting the service may be uncertain about information needed and only vaguely aware of basic problems and in expressing their thoughts clearly. This is often true of the handicapped, aged, depressed, or young inexperienced person. For these reasons, interviewing must explore the general needs of a person, and must be sensitively conducted to be productive. The interviewer can learn to conduct interviews with the necessary skill and sensitivity by developing awareness of human needs and feelings.

*c. Common Human Needs and Differences.*

(1) Human beings are alike in certain basic ways. Some areas of common need include the need for food, clothing and shelter, safety and security, the need to love and be loved, the need to be cared for, and to be recognized as a person, the need for human dignity.

(2) It is important to realize that human beings are also different. There are cultural and economic differences which subdivide humanity into groups, and personal differences which render every individual unique. The interviewer should recognize the individuality of all clients and not treat them categorically as members of age, ethnic, racial or religious groups, although it is important to be aware of the general kinds of problems encountered by members of particular populations.

*d. The Importance of Understanding Human Feelings.*

(1) In developing a sensitivity toward human feelings, it is necessary to understand our own. One kind of feeling which we all share is prejudice. Although it is easy to like and agree with people who are like ourselves, sharing our values and living like ourselves, it is not as easy to understand those who do not share our values and follow a different style of life. Some people find that they can tolerate some kinds of differences but not others. For example, a person tolerant of soft drug abuse might be very intolerant of profane language. Sometimes we are scarcely aware of such personal prejudices. It is very important for us to increase our awareness of those feelings if we are to help the client fully.

(2) Other feelings that impact situations are learned social responses. For example, if a person seems rude or angry with us in a social situation or ordinary business transaction, we must learn to control our feeling responses if we are to conduct a productive interview. Understanding our own feelings and those of the client is essential in maintaining control.

*e. The Influence of Situations on Human Feelings.* Feelings are not always easy to control because they are not necessarily rational. In times of stress, human emotions often become difficult to manage. Workers in the human services area are especially likely to encounter individuals and families who are under stress. It is important for interviewers to recognize that many clients are under

pressure from difficult situations. Generally, they have exhausted their own resources through a series of very frustrating attempts. Sometimes they have not known where to turn and have bottled up their own fears and anxieties for periods of time. They may feel needed services have been denied arbitrarily or because of discrimination. It is difficult to work with them because of their feelings.

## Section B: Interviewing

*Purpose:* To continue staff orientation to interviewing in information and referral services.

*Time:* 3½ hours.

*Materials:* Outline of presentation (as shown below).

*Presentation and Participation:* Trainer to present, lead discussion and summarize training material below, supplementing with examples and other material as desired. The trainer may wish to role play examples. To illustrate subsection c, the trainer may wish to assume the role of the interviewer and demonstrate how to handle an inquiry.

*a. Some Concepts Underlying Successful Interviewing.* Belief in the dignity and worth of human beings is essential in human service interviewing. It is manifested in the following areas of good interviewing.

- (1) Listening attentively.
- (2) Using sensitivity in communicating with the client.
- (3) Respecting the client's right to confidentiality.

### *b. Starting the Interview.*

(1) At the beginning of an interview, the client is often uncomfortable and lacking self-confidence. The experienced interviewer understands that this may be for a variety of reasons, not the least of which is that many clients have never sought help from anyone beyond the familiar circles of family and friends.

(2) The interviewer should begin by creating an atmosphere which encourages the client to provide information. Fears and apprehensions need to be minimized. The interviewer's tone of voice and choice of words are important. If the interviewer shows that he or she is a good listener and conveys a genuine sense of interest and warmth, a relationship can be established for permitting a productive interview to follow.

(3) In many instances, it is helpful for the interviewer to begin by explaining the purpose of the I&R service. Sometimes, it is necessary to note the limitations of the service. For example, the service does not provide medical services, but it can provide access to the needed service. When the client understands the kind of help the I&R service offers, he or she will be encouraged to discuss his or her problem.

### *c. Identifying Problems.*

(1) The interviewer who is a good listener will sometimes recognize that the client has a problem which is different and more basic than the one he or she is calling about. The client may be unaware of this problem, or the possibility of its solution. The interviewer must be willing to involve himself or herself with the problem presented by the client as well as with the more basic problem if one is recognized.

(2) It is a difficult and often delicate matter to look for underlying problems, especially when the problem lies in a personal and sensitive area. Sometimes a client will not feel free to speak out the first time he or she calls. He or she might call again another time. Or he or she might receive help for an underlying problem from the agency which the interviewer recommends. The interviewer should recognize that the right of privacy belongs to every person, and the client has the right to choose not to discuss further problems. However, the tact and skill of the interviewer often determines the degree of depth of the interview.

## Section C: Information giving and referral

*Purpose:* To continue staff orientation to interviewing.

*Time:* 3½ hours.

*Materials:* Outline of presentation (as shown below).

*Presentation and Participation:* Trainer to present, lead discussion and summarize material below, supplementing with examples and other material as desired. The trainer should give special attention to the use of the resource file. The recording forms may be introduced in this section.

*a. Information Giving.* Information giving is an integral part of the interviewing process. It occurs when the interviewer provides information to the client, and usually follows or alternates with information collecting. Shown below are some specific aspects of information giving.

### *(1) Linking needs and resources.*

(a) After obtaining the needed information from the client, the interviewer brings into use his or her knowledge of community resources. The resource file plays an invaluable part in this process. When the interviewer's information is sufficient, he or she can determine the appropriate resource(s) and impart this information to the client. When more than one resource is available, the interviewer can encourage the client to use his or her right of choice. Only significant information should be imparted; irrelevant information about the resource is not useful and can be confusing.

(b) Basic to all information giving about resources is the name, address, and telephone number of the agency and/or organization, the name of the person to contact, and directions for getting there.

(c) In giving information, it is the responsibility of the interviewer to ensure that the client understands. Communication difficulties often prevent the client from understanding information when it is given. This can happen for a variety of reasons. Sometimes it is necessary for the interviewer to repeat or rephrase the information.

(d) During the information giving process, the interviewer sometimes encounters anger not previously surfaced during the interview. Sometimes is the fault of the interviewer; often it is the result of frustration and uncertainty. Or it may be caused by a mistake or a misunderstanding. The interviewer can acknowledge it and apologize if the mistake or misunderstanding belongs with him or her; if it is the client's, the interviewer can explain and clarify the matter with enough sensitivity to avoid embarrassing the client. Sometimes the anger is expressed by remarks which may be offensive to the interviewer, such as racial slurs or diatribes against certain types of services. This is not the time for expression of the interviewer's own viewpoint. In the case of criticism of certain services, it may be helpful for the interviewer to offer factual information in the effort to get the client back on the interview track. This requires delicate handling and good judgment. Generally speaking, when anger arises at any stage of interviewing, the interviewer should be ready to meet such circumstances with an understanding of human feelings and acknowledge his or her own reaction to them.

(2) *Ending the interview.* When the request has been understood and the appropriate information given, the purpose of the interview has been completed. Some clients will not want to end for a variety of reasons. At such times, a tactful statement should suffice to end the call, such as letting the client know you were happy to be of help, or sorry you were unable to be more helpful. In some cases, letting the client know that he or she may call back to let you know if he or she was successful can help to end the conversation.

*b. Referral.* Referral may be of two types: simple or complex (see para 2-3 a of this handbook).

### *(1) Reason for Complex Referral.*

(a) Complex referral is sometimes necessary because of physical and/or emotional problems. The interviewer can sometimes recognize that a client has been emotionally exhausted simply by calling the information and referral service, and contacting another agency would be beyond his or her ability.

(b) Complex referral is also necessary because some agencies have policies which require a formal referral before service can be offered. The resource file is useful in identifying those agencies which require referral from an authorized facility.

(c) In addition, many clients do not use the information which would help them even though they understand the action they need to take. Uncertainty, unfamiliarity and fear sometimes prevent people from speaking in their own behalf. Under such circumstances, extra support can help to bring the person together with the appropriate community resource.

(2) *Complex Referral.*

(a) Complex referral involves the interviewer establishing a definite appointment for the client.

(b) On contacting the resource agency, the interviewer should be ready to impart the following information.

1. Name of client.
2. Address of client.
3. Telephone number.
4. Problem of client.
5. Time when client can keep appointment.
6. Name of interviewer making referral.
7. Name, address and telephone number of service.

(c) After setting up the appointment, the interviewer should telephone the client back to let him or her know the following details.

1. Name and address of resource agency.
2. Date, time and place of appointment.
3. Name of person who will be seeing the client.
4. Any other pertinent, helpful information.

(d) Where conference call equipment is available and practical, the formal referral can be made with client, interviewer, and contact person at the resource agency participating. This involves the client acting on his or her own behalf, which tends to have a beneficial effect, and eliminates the need for the interviewer to call back to give information.

c. *Follow-up.* Follow-up consists of contacting the referral agency and/or the client to find out whether or not contact has been made and the service is being provided. It is a required element in all complex referral cases. Procedures for conducting telephonic follow-up should be discussed per paragraph 2-3 c of this handbook.

Section D. Review of Interviewing, Information Giving and Referral, and Follow-up.

*Purpose:* To summarize the interviewing process, to reinforce some major points, and to clarify some procedures.

*Time:* 3½ hours.

*Materials:* Outline of presentation (as shown below).

*Presentation and Participation:* Trainer to summarize and lead discussion of the material presented in Unit III, including the material shown below.

a. Purpose of interviewing is to gain sufficient information for the interviewer to make a referral or give helpful information. The client needing help should be:

- (1) Received with courtesy and understanding.
- (2) Given an opportunity to present questions and views of the need.

(3) Supplied with correct information about the agencies involved.

(4) Guided to proper and appropriate source of help.

(5) Presented an explanation of why he or she is being guided to an agency.

(6) Assisted in locating, contacting and making application to the agency, if necessary.

b. Interviewer should determine the problem and do the following.

(1) Grasp the client's feeling about his or her situation and how he or she defines it.

(2) Find out what the client would like to do about the problem.

(3) Find out what resources have already been investigated and with what result.

c. It is important that the interviewer consider the following in making referrals.

(1) Know the limitations and scope of services of agencies.

(2) Find out the problem.

(3) Determine appropriate resource.

(4) Ascertain if the client is being helped or has been helped by any other agency.

(5) Explain services available: choices, alternatives.

(6) Determine if the referral is acceptable to the client.

(7) If referral is unacceptable to the client, find out the reason. There may be a need for further clarification of agency services and policies.

(8) Let client know what information the agency will require, and for what reason.

(9) If you need to leave the telephone to get information or for any purpose, let the client know what you are doing and why.

(10) If you need to make calls to get information about a person, it is necessary to let him or her know that you are doing it and why.

(11) It is not necessary to defend agency practices to the client, but never criticize them to the client. It is better to focus on the client's needs and problems and how to obtain the needed services.

d. Several things are important to note as they relate to handling requests.

(1) Although the interviewer realizes immediately that little can be offered a client, some time is spent talking to the individual. It is important to explain—as far as possible—why this is the situation. This is explained in terms of the "resource system." An attempt is made to make appropriate suggestions to help the individual deal with his or her own problem. By deliberately creating an atmosphere of accessibility the client will likely call again with other needs.

(2) Questions are asked in order to explore all aspects of the problem and to uncover additional needs for which services may be available.

(3) A judgment is made as to the client's ability to follow through on a referral. For those who seem less able, the interviewer participates more fully in getting them to sources of help. The other side of this has to do with agency accessibility. If it is learned by our own experience that a particular agency is unresponsive to any degree, initial contact is frequently made for the client.

(4) Unless is clearly apparent, the client is told why a particular agency is suggested, the services that are offered, and the best way to communicate with the agency (in-person, letter, or by telephone) as well as how to make the request if this information seems necessary.

e. Purpose of follow-up is to determine the outcome of complex referrals. When conducting agency follow-up, it is important to stress that this is part of ACS' efforts to assess and evaluate its own program operation.

#### **Unit IV: Linking Needs and Services and Recordkeeping**

*Purpose:* To acquire experience in assessing needs and distinguishing between the request for help as expressed by the client and the actual needs; to become skillful in using the I&R resource file, in completing the I&R forms, and establishing and maintaining records; to become familiar with confidentiality safeguards.

*Time:* 8 hours.

*Materials:* I&R resource file

I&R forms

List of hypothetical requests

*Presentation and Participation:*

a. Trainer presents hypothetical inquiries to trainees. Discussion should be guided by the following questions in relation to inquiries.

- (1) What are the expressed needs?
- (2) What further information appears needed?
- (3) What feelings are likely to be present on the part of the client?
- (4) What feelings are likely to arise in the interviewer?
- (5) How and to what extent should the interviewer explore further needs?
- (6) How should the appropriate resource be located and presented to the client?

b. The inquiries are to be presented as actual inquiries, using the telephone if possible. Each inquiry chosen is to be completed using the appropriate form.

c. Trainer makes trainees aware of the client information safeguards required by the Privacy Act of 1974 and possible civil remedies for improper use or disclosure of that information.

**Figure A-1. I&R Staff Training Manual**

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